

Oklahoma Systems of Care  
**Flex Fund Guidelines**

The following guidelines were created for ODMHSAS-funded SOC communities and approved by the ODMHSAS and the OSOC team. These guidelines are designed to allow for sufficient flexibility to serve families based on their individual needs. These guidelines do not replace the need for good judgment while making local decisions on the use of flex funds for families in Wraparound. When in doubt please consult with the State Project Director.

There are two main purposes for the use of flex funds for families currently receiving Wraparound services within a funded Systems of Care Community.

**Emergency needs for families include:**

- Documented rental deposits and/or the first month's rent, or a single month's rent to avoid eviction. Apartment rent and deposits for adolescents living independently.
- Food or personal care items for the household. Neither alcoholic beverages nor tobacco products may be purchased with flexible funds.
- Medication necessary to maintain physical or psychiatric needs.
- Emergency medical/dental expenses.
- Durable goods such as furniture and appliances. (Flexible fund expenditures for large appliances, such as stoves, refrigerators and air conditioners, cannot be replaced for 18 months unless there is documentation that the appliance is no longer working.)
- Home maintenance and repairs including, but not limited to, plumbing, painting, repair of broken windows or doors, purchase of screens and door locks and insect fumigation.
- Suitable clothing and shoes for family members.
- Transportation costs necessary to get children to and from medical and/or counseling appointments, including costs for car repairs necessary to assure adequate medical and/or behavioral health care.

**Purchasing services or goods necessary to meet the identified needs of the family as part of the treatment plan** (e.g. tutoring, mentoring, group and family counseling, job placement, therapeutic or recreational services and educational or vocational advocacy).

- Expenses for family recreational activities such as trips to the zoo, Omniplex, state fair, etc. Documentation for flexible funds expenditures for recreational activities will include a brief statement outlining the therapeutic value of the activity.
- Expenses necessary to assist in normalizing a child's life (e.g. karate, music, dance or swimming lessons, equipment needed to participate in organized sports, uniforms needed to participate in scouting or other appropriate youth programs, membership in appropriate youth and family clubs, expenses for a field trip, uniforms for employment, etc).

### **General Guidelines**

- Flexible funds may not be disbursed directly to families; rather, flexible funds should be expended as directed reimbursement for goods and services.
- All Systems of Care Communities are required to have a local policy and process for utilizing flexible funds.
- All flexible fund expenditures will be reviewed by the families Care Coordinator along with the family team and an assessment made of the legitimate need.
- Flex funds must be approved locally by the local Project Director.
- All flexible fund expenditures must be documented with receipts and a brief statement of the therapeutic purpose of the expense.
- Flexible funds should only be used after all other sources of funding have been exhausted.
- Within the reasonable constraints of time, level of emergency need and scheduling available, flexible fund expenditures should be made with the advice and consent of the entire Family team.
- Communities are strongly encouraged to have an oversight body review flex fund expenditures on a regular basis. The committee's review of flexible fund expenditure takes place after the funds have been disbursed. The purpose of the committee's review of flexible fund expenditures is to track expended funds as a percentage of budgeted amounts, ensure appropriateness of expenditures, provide the Community Team with reports, and to coach and counsel Care Coordinators as necessary to ensure continued fiscal responsibility.

- Any purchases over \$500 or more must have prior approval of either the Principal Investigator or State Project Director.
- The purchase of dog food is not allowed

Flex funds are designed to quickly address short term needs of the family while longer term solutions that will remain available to the family after they graduate are developed. Examples include counseling and other therapeutic interventions, family activities and rewards for good behavior and accomplishing goals.

Expenses for monthly and regular activities designed to support family and youth involvement in Systems of Care should not be taken out of the flex funds budget category. These activities including family and youth meetings, holiday parties and group outings, should be budgeted from a separate category such as youth and family activity and support.

The use of gift cards should be extremely limited. If a gift card is used it should be for vendors that provide very specific merchandise or services such as sporting goods or fuel. Communities are encouraged to develop a higher accounting requirement such as a return receipt if gift cards are used.

Flex funds should never be used to purchase the same item at the same time for all families involved in Wraparound. Flex funds are designed to meet the unique needs of each individual family. If the flex fund expense is not addressing a unique need then it is not an appropriate use of flex funds.